Checklist for UserID Account Maintenance

This checklist outlines what is required in each of the systems in order for a professional user to have appropriate access in the Human Resource Management System. This also outlines the steps to complete on professional and non-professional user accounts when employees transfer to other agencies or are withdrawn from state employment.

For detailed step by step instructions please refer to the Security Administrator Handbook.

I. **HCM Professional Users**
   o Roles assigned to the position in HCM
   o SU01 User Account with validity dates and Agency User Group
   o >For SSO Users ONLY: Entry in SNC tab
   o Note: Effective April 27, 2010 agency Security Administrators will no longer need to assign licenses in SU01. Licenses are now assigned automatically to the user account based on the roles assigned.
   Entry of Authorized Profile in OOSB
      o If PERS_ADMIN_PROC role is assigned add additional entry of WA_SOW in OOSB

II. **BI Professional Users**
   o Roles assigned in BI
   o SU01 User Account with validity dates and Agency User Group
   o >For SSO Users ONLY: Entry in SNC tab
   o Entry of Authorized Profile in OOSB in HCM
   Note: Effective April 27, 2010 agency Security Administrators will no longer need to assign licenses in SU01. Licenses are now assigned automatically to the user account based on the roles assigned.

III. **E-Recruiting Professional Users**
   o Role(s) assigned in E-Recruiting
   Note: Effective April 27, 2010 agency Security Administrators will no longer need to assign licenses in SU01. Licenses are now assigned automatically to the user account based on the roles assigned.

IV. **Portal Professional Users**
   o Email address (LDAP) or agency domain\username (UME) UserID account
   o BI Reporting for E-Recruiting, Grievance, HR or Finance :
      o SU01 User Account with validity dates (HCM – Section I)
      o Entry of Authorized Profile in OOSB (HCM –Section I)
      o SU01 User account with role(s) and validity dates in BI (BI - Section II)
      o BI_Reports_GRP role assigned to the Professional portal account
      o Professional Portal account mapped to user's BI account
      **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapped to the Federated Portal.
   o E-Recruiting Functionality (*Professional Users in EP0*):
      o Role(s) assigned in E-Recruiting (E-Recruiting - Section III)
      o SU01 User account with General_Access role and validity dates in BI (BI - Section II)
      o Assign E-Recruiting Group role(s) that match E-Recruiting role(s) in Portal
      o Portal account mapped to user's BI account
      **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapped to the Federated Portal.
   o WEBGUI users
      o Roles assigned to the position in HCM (HCM – Section I)

- o SU01 User account with General_Access role and validity dates in BI (BI - Section II)
- o HR_HTMLGUI_GRP role assigned to the Professional portal account
- o Professional Portal account mapped to user's BI account
  **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapped to the Federated Portal.

When Employees Transfer out of the Agency (Professional Users Only)
- o HCM – Delete employees profile entries in OOSB
- o HCM – Change the User Group back to ESSUSER in SU01
- o
- o HCM – Delete the SNC entry – SSO only
- o BI – Delete the BI user account
- o E-Recruiting – Delete roles ONLY
- o Portal – Delete user mapping for agency Domain\Username – UME Professional account
- o Portal – Delete the Professional account (agency Domain\Username - UME) - LDAP e-mail address account cannot be deleted
- o Portal – Delete the Group and/or User_Admin roles (LDAP)
- o Portal – Delete user mapping for e-mail address account (LDAP)
  **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapping cleared from the Federated Portal.

When Employees Leave State Employment – Withdrawn Status (Professional and Non-Professional Users)
- o HCM – Delete profile entries in OOSB if there are entries
- o HCM – Delete the user account (SU01) – this takes away user's access to ESS
- o BI – Delete the BI user account if created
- o E-Recruiting – Delete roles ONLY
- o Portal – Delete the ESS account (8 digit personnel number - UME)
- o Portal – Delete user mapping for agency Domain\Username – UME Professional account
  **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapping cleared from the Federated Portal.
- o Portal – Delete the Professional account (agency Domain\Username - UME) LDAP e-mail address account cannot be deleted
- o Portal – Delete the Group and/or User_Admin roles from the e-mail address account (LDAP)
- o Portal – Delete user mapping for e-mail address account (LDAP)
  **Effective April 26, 2010 you MUST also contact the DOP Service Center to have Professional Portal accounts mapping cleared from the Federated Portal.